



U.S. General Services Administration

FSSI Wireless TEM Services User Guide

A close-up, slightly blurred photograph of the American flag, focusing on the white stars on a blue field, with red and white stripes visible in the background.

January 2008

GSA Federal Strategic Sourcing Initiative Wireless Telecommunications Expense Management CUSTOMER USER GUIDE

1. PURPOSE

The purpose of this Wireless Telecommunications Expense Management (TEM) Services Indefinite Delivery/Indefinite Quantity (ID/IQ) contract is to provide a pool of well qualified TEM suppliers capable of providing market-leading wireless TEM services to a multitude of Federal agencies. This effort is envisioned to streamline ordering of TEM services by Federal agencies interested in lowering their total cost of using and managing commercial wireless services.

This user guide is intended to provide Government agencies with guidance in ordering services from the General Services Administration (GSA). The guide also provides Federal Strategic Sourcing Initiative (FSSI) Wireless TEM contracts including GSA points of contact, Contractors, contract numbers, ordering instructions. Additional information regarding FSSI TEM is available at <http://www.gsa.gov/fssitem>.

1.2 Background

The Office of Management and Budget issued a memorandum on May 20, 2005 entitled Implementing Strategic Sourcing, “that mandated all Head of Services establish mechanism to increase savings, value, and socio-economic participation.

On November 16, 2005, the General Services Administration and the Department of Treasury launched the Federal Strategic Sourcing Initiative (FSSI). The purpose of the initiative is to:

- Test the ability to strategically source across federal agencies
- Share best practices and build the strategic sourcing community of practice
- Learn lessons applicable to future strategic sourcing efforts at the federal or agency levels
- Avoid unnecessary duplication of effort in responding to the OMB Strategic Initiatives

FSSI is charted under the purview of the Chief Acquisition Officer’s Council and the Strategic Sourcing Working Group monitored by the Office of Federal Procurement Policy within OMB. The FSSI Wireless Telecommunications Expense Management (TEM) Services commodity team (one of five under FSSI) includes representation from at least ten agencies, all of whom have agreed through a formal project charter to participate in the pilot in some capacity.

In December 2005, the FSSI Wireless team developed their goals, ground rules, high level project plan and the team charter.

In January 2006, the FSSI Wireless team began gathering the spend and contract /commodity inventory data from the participating agencies. In parallel, the team was conducting market analysis of current best practices.

From the analysis, the team discovered the challenges agencies are experiencing with inaccurate wireless inventories, incorrect billing, and multitude of service plans that are confusing and unmanageable. The agencies are currently using various contractual vehicles and service providers for their wireless services. To mitigate the challenges, the team determined a TEM solution was appropriate.

1.3 FSSI TEM Program Overview

This ID/IQ contract is intended to provide Federal agencies a full range of outsourced wireless TEM services to help them manage their wireless service and devices. These independent TEM services are expected to be used with agency wireless services and devices primarily acquired through the GSA Federal Supply Schedules, Government-Wide Acquisition Contracts (GWACs) or other agency-established enterprise Blanket Purchase Agreements (BPAs) and contracts. Also these TEM services will provide users with a convenient and single-source for ordering wireless devices and service from regional or local carriers that are not available through Networkx.

FSSI TEM Benefits

- Optimized rate plans/lower effective per minute pricing
- Accurate billing and payment
- The ability to identify and eliminate unused lines
- Improved compliance to rate plans and related wireless spend management policies
- Improved asset management
- Management of bill related issues and conflict resolution

2. CONTRACT INFORMATION AND GENERAL GUIDANCE

2.1 Contract Characteristics

FSSI TEM contracts are fixed price Indefinite Delivery Indefinite Quantity type contracts. The contract period of performance is 2 years with 3 one year options – from January 2008 to January 2013.

All customers are charged a 1 percent contract management fee which is included in the FSSI TEM contractor's prices. The Contractor will submit the appropriate fee directly to GSA, based on the total task/delivery order amount. In GSA assisted ordering, the assistance fee is negotiated between the user agency and GSA.

The Government will guarantee a minimum dollar amount of \$3000 under each contract awarded during its term. The cumulative maximum not-to-exceed dollar amount, including all options for all awards, which the government may order at no additional unit costs to the Government, is \$93,000,000.

2.2 Services offered:

The TEM providers offer solutions capable of managing wireless telecommunications assets and services throughout their lifecycle starting with the ordering process, through operational use and including collection and disposal.

The five **categories** of service:

1. Program/Project Management
2. Project Startup
3. Wireless TEM
4. Wireless TEM Transition Services and
5. Resale Services for Non-Network Wireless Services and Devices

The following five services make up the “**core**” set of TEM services:

1. Wireless Service Contract/Agreement Administration
2. Inventory Management
3. Invoice Management and Audit
4. Rate Plan Optimization
5. Management Reporting

In addition to the above, the TEM services include an “**optional**” set of services:

1. Contract Optimization
2. Ordering and Procurement
3. Bill Payment
4. Dispute Recovery
5. Device Disposition/Disposal

2.3 FSSI TEM Contracts

Each contract is organized based on the uniform contract format consisting of Sections A through M.

- Section A: Award document (SF 1449).
- Section B: Contractors pricing approach and separate pricing tables for services and equipment
- Section C: Statement of Work (SOW) including the contractors Management, Subcontracting Plan, and its Technical Approach which identifies the proposed service types.
- Section D: Packaging and Marking
- Section E: Inspection and Acceptance
- Section F: Delivery of supplies and services and associated delivery schedule for reporting requirements.
- Section G: Contract Administration
- Section H: Special Requirements- Type and term of contracts and minimum revenue guarantee.
- Section I: FAR/GSAM clauses.
- Section J: Attachments
- Section K: Representations, certification and Other Statements of Offerors

- Section L: Instructions, Conditions, and Notices to Offerors
- Section M: Evaluation Factors for Award

2.3 Redacted Version of Contract

Each FSSI TEM Contractor's redacted contract can be viewed on the Contractor's website or through the link at GSA's website <http://www.gsa.gov/fssitem>.

2.4 Authorized Contract Users

As with all GSA Telecommunications Contracts, FSSI TEM is available to all authorized agencies and activities as stipulated in GSA Order ADM 4800.2E as revised which is accessible at:

http://www.gsa.gov/Portal/gsa/ep/contentView.do?contentType=GSA_BASIC&contentId=8128&noc=T

Authorized agencies and activities can place task/delivery orders in accordance with the provisions of the FSSI TEM contracts, its internal agency policies and regulations, and by an agency Contracting Officer or designee.

There is no need to receive GSA PCO approval to place a FSSI TEM order as long as the Ordering Official:

- Is a warranted contracting officer within GSA's FAS; or
- Has been delegated to place orders by the ordering authority within his or her agency or organization;
- Is acting on behalf of an agency authorized to use this contract per GSA Order ADM 4800.2E as revised; and
- Abides by FAR regulations, agency regulations, etc.

Contact the FSSI TEM PCO with any questions concerning an authorized user.

The FSSI TEM PCO shall be the only person authorized to make or approve any changes in any of the requirements of the FSSI TEM contracts, notwithstanding any provisions and/or clauses contained elsewhere in the contracts, said authority shall remain solely with the FSSI TEM PCO.

In the event the Contractor should make any changes at the direction of any person other than the FSSI TEM PCO, such change shall be considered to have been made without authority, and no adjustment shall be made in the contract price to cover any increase in costs incurred as a result thereof.

All task/delivery orders placed under these contracts shall be fixed price. Performance-based work statements must be used to the maximum extent practicable if the order is for services (see FAR 16.505 and procedures at FAR 37.102).

All prices will be listed in the FSSI TEM contract Section B Pricing Tables. If a price is not included in the Section B Pricing Tables, the Contractor shall submit a proposal to modify the

contract to add the desired products and/or services or to propose quantity discounts. These modifications shall be submitted to the GSA Procuring Contracting Officer (PCO) with copies sent to the FSSI TEM Program Manager (PM). The customer Agency is encouraged to notify the FSSI TEM PM and CO if a modification is anticipated.

The following table lists the TEM Services contractors, GSA Contracting Officer and Contracting Officer's Technical Representative (COTR) for each contract. Contact information is listed after the table.

Contractor	Contract Number	GSA CO	GSA COTR
iSYS, LLC		Lucy Cavazos	Richard Peery
Avalon Technologies		Lucy Cavazos	Richard Peery
Booz – Allen Hamilton		Lucy Cavazos	Richard Peery

The GSA TEM Procuring Contracting Officer is:

Ms. Lucy Cavazos
General Services Administration
FSSI TEM Contracting Officer
Federal Acquisition Service (FAS)
100 N.E. Loop 410 Suite 1400
San Antonio, TX 78216
Phone: (210) 341-8307
Fax: (210) 341-8304
E-Mail: lucy.cavazos@gsa.gov

The GSA TEM Contracting Officer's Technical Representative (COTR) is:

Mr. Richard Peery
General Services Administration
FSSI TEM (COTR)
819 Taylor Street
Fort Worth, TX 76102
Phone: (817) 574-4318
Fax: (817) 574-4228
E-Mail: richard.peery@gsa.gov

The GSA TEM Program Manager is:

Mr. Michael Loria
General Services Administration
FSSI TEM Program Manager
Federal Acquisition Service (FAS)
500 Poydras Street
New Orleans, LA 70130-0000
Phone: (504) 589-4348
Fax: (504) 589-4399
E-Mail: michael.loria@gsa.gov

3. ORDERING PROCESS

Before an order is processed, the ordering agency must identify its requirements and determine if they are within scope of the FSSI TEM Contracts and if the requirement is already priced on the contract.

The ordering agency has two options for placing orders: Direct Order/Direct Bill or GSA Assisted Services. Each subsection below will identify the required actions for each type of order along with an example.

3.1 Direct Order/Direct Bill

Customers can interact directly with the FSSI TEM Contractors and go directly to the FSSI TEM Contractors to place orders. With Direct Order/Direct Bill, the agency is responsible for all aspects of the acquisition and administration GSA only provides the contract vehicle. The customer agency contracting officer or designee will be subject to the FAR, rules, regulations, and conditions promulgated and enforced by that customer agency. The billing for these services is directly between the Ordering Agency and the FSSI TEM Contractors.

If there is more than one contractor that can perform at a location, the ordering Agency will give fair consideration to all the contractors being considered for a given order. When considering with which contractor an order will be placed, the Agency will exercise business judgment consistent with the business and mission requirements of the organization placing the order(s). The fair consideration process is intended to be straightforward, simple, and reflective of the nature of the telecommunications services being procured.

In accordance with FAR 16.505, each Agency must provide each FSSI TEM Contractor with a "Fair Opportunity to be Considered" unless one of the exceptions cited in FAR 16.505(b)(2) applies, and the appropriate Agency Contracting Officer or other designated agency official appointed in accordance with agency regulations fully documents and signs the justification citing the rationale for using one of these exceptions. This documentation is to remain in the customer's official task/delivery order file and must be provided upon request to the GSA FSSI TEM PCO.

The Agency Contracting Officer/Ordering Official will use the following procedures for any given order that requires fair consideration:

- (a) They will consult the latest available information about the contractors relevant to the service requirements. Sources of data may include, but are not limited to the following:
 - (1) Contract prices
 - (2) Analyses of all available information relevant to the decision inclusive of that sought and received from the contractors
- (b) The Agency will decide based on consideration of the available information and use one of the following methods for deciding which contractor will receive a given order:

- (1) Base their decision solely on relative contract prices without further consideration of other factors
 - (2) The Agency may base their decision on a combination of price, technical, and past performance considerations appropriate to the particular decision being considered.
- (c) The Agency Contracting Officer/Ordering Official will place the order with the selected contractor

Requirements for services will be articulated in the form of a Statement of Work (SOW). The SOW is to be structured to ensure that all requirements are clear and that the contractor selection process is fair and consistent. Each SOW should address at a minimum the following:

- Summary of Required Services: Provide a brief description/summary of the services sought and when the products/services are required.
- Purpose: Provide a short discussion of the project's background which can include
 - a. Brief description of the agency organization
 - b. Scope of the requirement
 - c. Current technical environment that describes the current architecture and any services provided by current contractors.
- Requirements: Describe the work to be performed without being too restrictive to the offeror's approach. Include technical requirements and performance requirements. Describe requirements and metrics to be used to assess quality of service delivery based on contract specified performance measures or others as needed, including technical interface requirements.
- Place of Performance/Delivery (e.g., where the service or product is required)
- Period of Performance/Delivery Schedule
- Travel Requirements (e.g., number of anticipated trips and location)
- Security Requirements: Personnel and information security requirements necessary to support this SOW.
- Government Furnished Equipment and/or Information: Identify the Government-furnished equipment and information if any to be provided to the contractor.
- Evaluation Criteria: How Contractor's offer will be evaluated.

Once the statement of work is finalized, the Agency will request information and or pricing directly from each FSSI TEM Contractor by sending a RFP/RFQ to each FSSI TEM contractor.

The customer Agency should establish the Evaluation Plan for its internal use. The evaluation plan should include the evaluation criteria, an independent government estimate (IGE), scoring schemes and the overall selection process for awarding the work to a FSSI TEM contractor. Formal evaluation plans or rating schemes are not required. Acquisition documentation should be consistent with the value and complexity of the services sought.

The Agency may send this request via e-mail with a suspense date as defined by the requesting customer. If the desired service and/or product are already available and priced on the contract, the Contractor will respond to the RFP/RFQ with the applicable existing CLIN(s) and pricing.

The FSSI TEM Contractor Points of Contact and FSSI TEM Services Matrix are publicly accessible at <http://www.gsa.gov/fssitem>.

Once a customer Agency has evaluated proposals and selected a Contractor, the Agency will place a task order with that Contractor. The Contractor will then deliver the required products and/or services per the task order requirements.

The Agency Contracting Officer/Ordering Official for each delivery/task order will be responsible for closing out the order when completed. The FSSI TEM Contractors must work in partnership with the Government to closeout orders as soon as possible by using procedures described in FAR 4.804. Notification that a closeout of a delivery/task order is completed must be provided to the FSSI TEM PCO immediately upon closeout.

3.1.1 Direct Order/Direct Bill Ordering Example

The following is an example of the scenario for utilizing the Direct Order/Direct Bill ordering method:

Example: The customer Agency has a requirement for a TEM product or service that is within scope and available on contract:

1. The Agency sends a statement of work (SOW) with information as listed on Page 8 of this document to all FSSI TEM Contractors.
2. Contractors will respond directly to the Agency:
 - a. That they can provide the desired services using existing contract CLINs, or
 - b. They can perform the work but not all items currently exist on contract. In this case the contractor must first submit a contract modification proposal to the GSA PCO for review and incorporation into their contract before they can propose pricing to the Agency.
3. Contractors will propose fixed price solutions to meet the SOW requirements.
4. The customer Agency is responsible for reviewing and selecting the Contractor and solution in accordance with the Agency's evaluation criteria. Once this is completed the Agency places the order.

3.2 GSA Assisted Ordering/Billing

Under GSA Assisted Services, GSA may perform for a fee any or all of the following on behalf of an Agency:

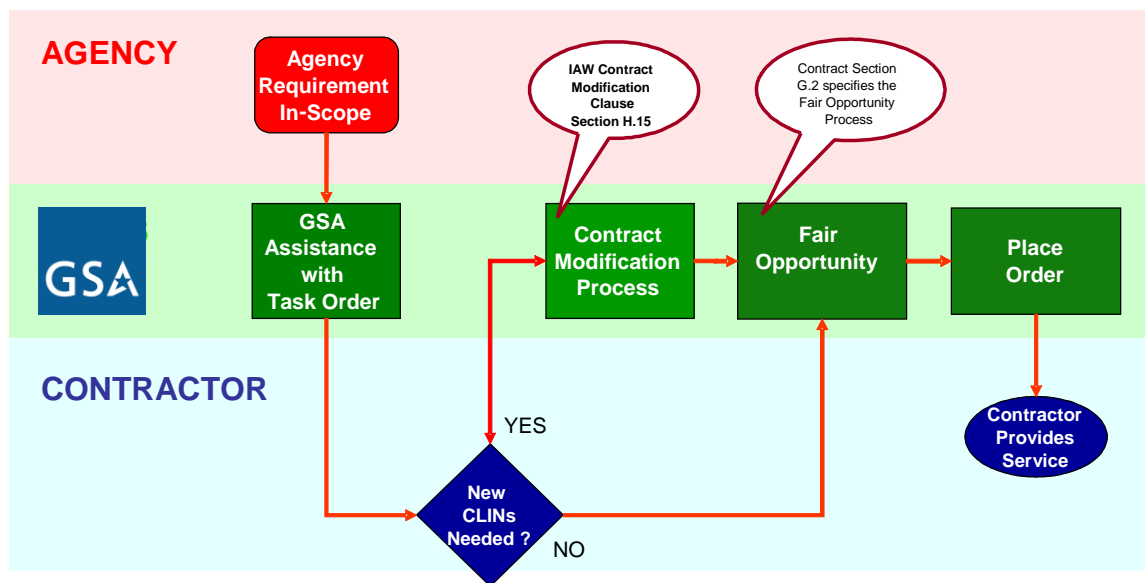
- Assist and/or develop an SOW
- Ensuring fair opportunity and contractual compliance
- Verification, obligation, and ensuring proper use of funds
- Evaluating proposals and awarding orders
- Maintaining all award documentation
- Processing order closeout

To conduct business between GSA and other Federal agencies, GSA uses reimbursement agreements. A reimbursement agreement is required for GSA Assisted Ordering/Billing. Reimbursement agreements are the primary means by which GSA receives requests from Federal agencies for acquisition services.

In GSA, a reimbursable agreement is formalized by the acknowledgement and signature of the customer on an Interagency Agreement (IA), with an accompanying customer funding document and GSA acceptance. GSA acceptance is required on all funding documents such as Military Interdepartmental Purchase Request (MIPR) and MIPR Acceptance. Normally, no acquisition or services may be performed by GSA until a reimbursable agreement is properly executed including funding documents.

The task order will be placed following the steps shown in the figure below, which are similar to those described for the Direct Order/Direct Bill Process.

FSSI TEM Process Flow GSA Assisted



3.2.1 GSA Assisted Ordering/Billing Example

Example: The customer Agency has a requirement for a wireless commodity spend analysis which is within scope of the TEM Services contract and will use GSA Assisted Service.

1. The Ordering Agency will contact the GSA FSSI TEM COTR CO or PM for GSA Assisted Services. Based on discussions with the Ordering Agency, the customer will prepare a Reimbursement Agreement to cover the estimated costs for the services based upon the level of assistance desired. GSA will prepare an Interagency Agreement, which

will include the GSA Assisted Service fee, the estimated cost of the required products and/or services along with the customer's signature acknowledging acceptance of the terms of the agreement.

2. The Agency develops a SOW (with assistance from GSA if part of Agreement) describing the required services.
3. GSA will send the SOW to all applicable TEM contractors to solicit a fixed price task order.
4. GSA will receive proposals from all interested FSSI TEM contractors and in a collaborative effort with the Agency evaluate and select the best value offer.
5. GSA will place the order and handle billing for the Agency.
6. GSA will ensure all products and/or services are received, all invoices are paid, and will closeout the delivery/task order.

4. CUSTOMER REPORTING REQUIREMENTS

4.1 Contractor Performance

In conformance with the Government's need to record and maintain information on Contractor performance during the life of these contracts the Customer agencies are to periodically evaluate the manner in which the Contractor performed in accordance with contract requirements such as: quality of service; cost efficiencies; timeliness; business relations; history of reasonable and cooperative behavior; commitment to customer satisfaction; and key personnel by using the Past Performance Information Retrieval System (PPIRS) at <http://www.ppirs.gov/default.htm>. Information obtained as a result of the evaluations may be shared with Government agencies for their use in support of future award decisions (FAR 42.1500).

4.2 Customer Reports

Customer agencies shall provide a report to the GSA FSSI TEM Program Manager via e-mail no later than the 20th of the month including the following:

Name of Contractor
Contract Number
Task/Delivery Order #
Total Dollar Amount of Order